INTERSERVICE TRAINING REVIEW ORGANIZATION
PROCEDURES MANUAL
Chapter 4

ITRO DOCUMENTATION/ADMINISTRATIVE REQUIREMENTS

1. **Study/Review Implementation Meeting Report Format**. The lead facilitator and study/review group chairperson will ensure a comprehensive report is completed at every meeting. The chairperson and the designated representative of each participating Service will sign the report. Figure 4-1, outlines the minimum report requirements. The lead facilitator will submit the report original to the Secretariat within 5 workdays of completion of the meeting. Each Service representative will provide a copy directly to his/her respective ITRO office.

ITRO STUDY/REVIEW REPORT FORMAT

1. Purpose. Include Title & Course Numbers of each course studied. To determine if there is sufficient commonality between each participating Service (list the title of the training being studied; e.g., "Army and Marine Corps Combat Engineer Training) to warrant Detailed Analysis.

2. Background. (Paraphrase from the Charter, stating what training is being studied, who is participating, etc. It is not necessary to repeat everything on an attachment; simply refer to it.

3. Discussion. (Here detail what took place at the meeting and provide sufficient detail to support the recommendation that will appear at the end of the narrative. Again, do not repeat, just refer to the attachments.)

4. Service Issues/Concerns. This is the opportunity for a Service to articulate a Service unique position on recommendations or discussion items developed during the course of the study.

5. Recommendation. (Always start this with "The QLG/DAG recommends proceeding with, or not proceeding with, detailed analysis.")

6. Signature Page

7. Attachments: Will vary according to the documentation required for a specific meeting. Consists of but not limited to the following: List of attendees, Service briefs, appropriate ITRO Forms, Resource Analysis Committee Reports.

Figure 4-1, Report Format

2. **Quick Look Group (QLG) Documentation**. Following DEB/DMRTEC approval of a study, the QLG will meet to initiate the study process. The QLG will make one of two recommendations: (1) Transition to a Detailed Analysis Group (DAG). This is a "Go" scenario; (2) Recommend termination of the study. This is a "No Go" scenario.

    a. Go Scenario. A "Go" recommendation will be considered to be approved by the DEB/DMRTEC unless the DAG has received contrary instructions from the Secretariat.   The QLG will provide a report to the Secretariat stating that initial Quick Look analysis is complete and study is progressing to Detailed Analysis Group stage. The Secretariat will staff the report of Service coordination. The report will be in report format, signed by the QLG Chairperson and Service representatives.

    b. "No Go" Scenario. A "No Go" recommendation will require review and approval by the DEB. The report to the DEB will be signed by the QLG chairperson and each Service representative and will consist of items in Figure 4-1 above. The narrative summary will detail the QLGs findings regarding commonality of training between the participating Services. Keep in mind that the determination of whether or not to proceed into a Detailed Analysis will be based on the degree of commonality of training between the participating Services. Such things as who will host or where the training will be conducted or how the consolidated curriculum will be designed, are not QLG concerns. The QLG findings will be followed by a detailed explanation of why the QLG does not recommend proceeding with detailed analysis. In the event there is not consensus, Service representatives are welcome to include separate Service remarks in the report.

    c.   QLG Reporting Requirements

        (1) Cover Sheet similar to the cover of this manual, with the ITRO logo, study title, and the date(s) and location of the meeting.

        (2) Meeting minutes or narrative summary of meeting results with a specific recommendation to proceed with detailed analysis or to terminate the study (GO or NO GO). Figure 4-1 is a suggested narrative format.

        (3) Documentation of initial request for study (memorandum, message, JCS tasking, etc.).

        (4) List of Attendees (Include name, grade, command, phone, fax, and email address)

        (5) ITRO Forms 1, 1A, and 2

        (6) Any briefing slides

        (7) Proposed DAG Meeting Schedule. A QLG may convert immediately to Phase I of the DAG, in which case, the QLG and DAG results will be documented in a single report. When combining the QLG and DAG, all documentation required for both meetings will be included in the report.

3. **Detailed Analysis Group (DAG) Documentation**

    a. <u>Status Reports/Meeting Minutes</u>. . Phase I of the DAG may require one or more meetings. A report is required for each meeting. Summarize recent DAG activity. The Lead Facilitator will provide Service representatives with an electronic copy and the Secretariat with an electronic copy of report and the original signature sheet. Minutes will be in the basic *Purpose, Background, Discussion, and Recommendation* format, deleting or adding paragraphs as appropriate. One or more Service representative may prepare a statement expressing Service concerns/issues for inclusion in the Discussion section when consensus cannot be reached. Documentation will include:

        (1) <u>Cover Page</u>

        (2) <u>Narrative Minutes</u>

        (3) <u>List of attendees</u>

        (4) <u>Any briefing slides</u>

        (5) <u>Visual illustration of the course structure (course model)</u>

        (6) <u>Notional POI</u>

        (7) <u>Additional documentation, as required</u>

    b. <u>Resource Requirements Analysis (RRA) Report</u>. The RRA report will be the basis for final decision to implement (consolidation, collocation, deconsolidation, or revision, as appropriate) or to terminate the study without further action. It will contain:

        (1) Cover page.

        (2) Narrative minutes. The Discussion section should contain enough information (detail) to support the Recommendation(s) made by the DAG.

        (3) List of attendees.

        (4) Proposed Implementation POA&M

        (5) Draft MOA and ISA (if required)

        (6) Cost Analysis Report.

        (7) Facilities Analysis Report

        (8) Manpower Analysis Report

        (9) Additional documentation, as required

    c. <u>Refinement Resource Requirements Analysis Report</u>. If required, a refinement RRA will be conducted. The report contains the same information as the RRA Report, with updated appendices reflecting the current resources requirements data.

4. **Plan of Action and Milestones (POA&M)**. See Figure 4-2 for the proper format of a POA&M.